

The National Guard Educational Foundation is grateful for all types of gifts and welcomes the opportunity to work with you to determine if one or more planned giving arrangements is right for you. Recognizing the private nature of such planning, all inquiries and communications are held in strict confidence and are without obligation. We encourage you to consult your attorney or financial advisor to determine your best course of charitable action.

#### TAKE THESE STEPS WHEN MAKING A PLANNED GIFT

1

Contact Luke Guthrie at the National Guard Educational Foundation at 202-408-5886 or [luke.guthrie@ngaus.org](mailto:luke.guthrie@ngaus.org) for more information about your options.

2

Contact your attorney and your financial advisor. Let them know you are considering a planned gift to NGEF. They can assist you in determining what type of gift best suits your personal and financial circumstances.

3

Be sure to talk to your family and friends about your plans and personal wishes.

*The benefits of planned giving can open the door for you to make a meaningful gift today. You can fund your contribution with an array of assets, and you can direct your support as you choose – to the general purposes of NGEF or to an area that interests you most.*

NATIONAL GUARD  
EDUCATIONAL FOUNDATION  
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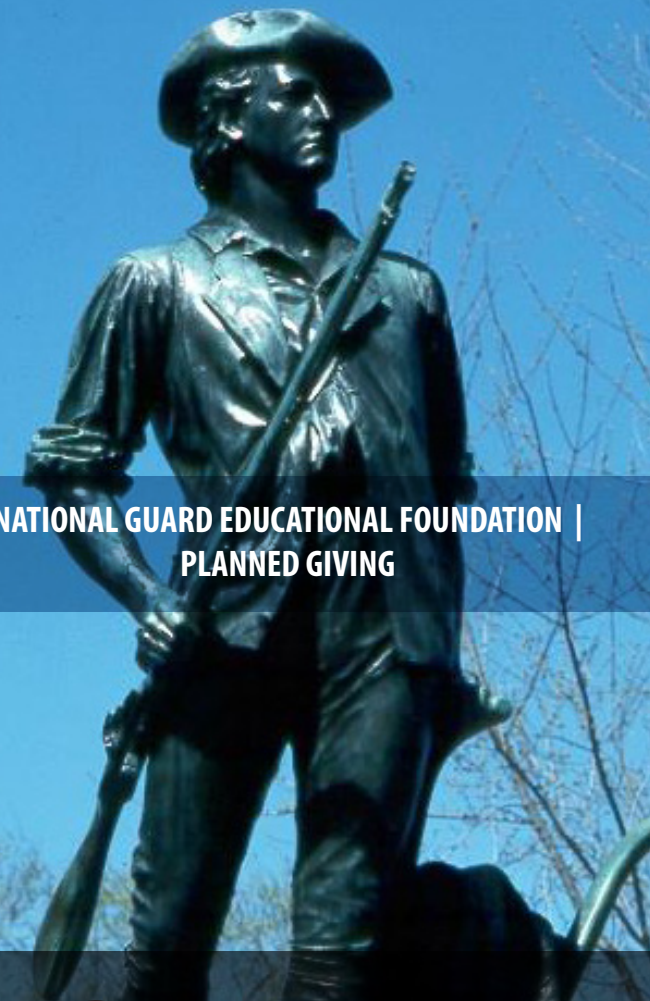
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[WWW.NGEF.ORG](http://WWW.NGEF.ORG)

# YOUR FOUNDATION YOUR NATIONAL GUARD YOUR LEGACY



NATIONAL GUARD EDUCATIONAL FOUNDATION |  
PLANNED GIVING



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FOUNDATION

## What is a Planned Gift?

A planned or deferred gift to the National Guard Educational Foundation (NGEF) is a meaningful way to create a lasting legacy of support. There are several options available to meet your appropriate needs.

## Leave a Legacy

The most common and simplest form of planned giving is a bequest – a gift that is made through a donor's will. Your will or trust document provides a specific understanding as to how you wish to transfer your assets to the people you love – and to those charitable organizations that you have supported in your lifetime. You can make a bequest in your will or living trust as your ultimate charitable gift to support NGEF's educational and scholarship programs. This gift costs you nothing now, so there is no risk to your lifetime financial security, and is exempt from estate taxes.

## Gifts of Stock and Appreciated Assets

Donating appreciated securities, including stocks and bonds, is an easy and tax-effective way to make a gift to NGEF. Your gift will further NGEF's mission of telling the Guard's story and you will not incur capital gains tax on the sale of appreciated securities. In addition, you will receive an immediate charitable income tax deduction.

## IRA Charitable Rollover

If you are 70 ½ years of age or older, you can take advantage of a simple way to benefit NGEF and receive tax benefits in return. You can donate up to \$100,000 from your Individual Retirement Account (IRA) directly to NGEF without having to pay income taxes on the money. Plus, this distribution can satisfy all or part of your required minimum distribution (RMD) for the year.

## Life Insurance

Gifts of life insurance that is no longer needed can offer excellent tax benefits and at the same time make a significant gift to support telling the Guard's story. You can name NGEF as the beneficiary of a new or existing life insurance policy or designate NGEF as the owner of your policy in your lifetime.

# About the National Guard Educational Foundation

Based in the heart of our nation's capital in the National Guard Memorial, the mission of the National Guard Educational Foundation is to preserve the history and heritage of the National Guard for present and future generations. As a 501 (c)3 nonprofit organization, NGEF fulfills this mission through a comprehensive portfolio of programs.

## The National Guard Memorial Museum

As the nation's only national museum dedicated to the citizen-soldier, the museum takes visitors through 6,000 square feet of artifacts, exhibits and images covering more than 380 years of National Guard history.

## The National Guard Memorial Library & Archive

The library is a repository of more than 6,000 volumes related to the story of the National Guard. This comprehensive research facility contains historically significant documents dating back to before the Civil War. The archive is home to artifacts spanning centuries of National Guard history.

## Medal of Honor Gallery

The National Guard Memorial Medal of Honor Gallery recognizes the meritorious service of Guardsmen since 1898. Twenty-eight states and the District of Columbia are represented by 128 names, medals and artifacts which reflect the utmost degree of valor.

## The National Guard Monument

Located on the hallowed ground of Omaha Beach in France, the National Guard Monument sits on the spot where the 29th Division broke through German defenses on D-Day, June 6, 1944. The monument and the original bunker on which it sits pay honor to all National Guardsmen who fought in the European theater.

## The Leonardo DRS Guardian Scholarship Fund

Since September 11, 2001, nearly 800 Guardsmen have made the ultimate sacrifice in support of the global war on terrorism. These heroes left behind more than 1,000 children. Established in 2011 and underwritten by Leonardo DRS, the fund provides college scholarships to the children of Guardsmen who have been lost in service to our nation since 9/11.

## The Van Hipp Heroes Scholarship

Established in 2015, the Van Hipp Heroes Scholarship provides tuition assistance to Guardsmen wounded in the global war on terrorism.

## The Process is Easy

Once you have determined that you would like to make a bequest to NGEF, the following sample charitable bequest language may be used in your will or revocable living trust:

*"I hereby bequeath \$\_\_\_\_\_ or \_\_\_\_%  
of my estate to the NATIONAL GUARD  
EDUCATIONAL FOUNDATION (federal  
tax ID number 52-1038433), located in  
Washington, D.C., to be applied towards  
the general tax-exempt purposes of the  
organization, or restricted to the following  
program:*

*\_\_\_\_\_."*

*If you have named NGEF in your will, please let us know so that we may express our gratitude and welcome you into the NGEF Heritage Society. If you wish to remain anonymous, we will respect your wishes. You may contact Luke Guthrie at [luke.guthrie@ngaus.org](mailto:luke.guthrie@ngaus.org) or (202) 408-5886 to make your planned giving arrangements.*